

What is Fund Raising?

"Fund raising is proclaiming what we believe in such a way that we offer other people an opportunity to participate with us in our vision and mission. Fund raising is precisely the opposite of begging....Fund raising is always a call to conversion....We are inviting people into a new way of relating to their resources....As a form of ministry it is as spiritual as giving a sermon, entering a time of prayer, visiting the sick or feeding the hungry."

Henri Nouwen, The Spirituality of Fund Raising

From the Christian perspective fund raising is essentially **stewardship** of all that God in mercy and grace has given to us. It arises out of our **gratitude** for what God has done among us in Jesus Christ. It is our desire to manage carefully and responsibly the gifts God has given us. Biblically, the steward is the manager of the household. We assume that role when we are employed as staff or serve as members of boards and committees. The resources we have been given to do our ministry are to be managed in thoughtful and careful ways, and whenever possible, they must be increased, as in the parable of the talents. This kind of care-full, responsible managing is a way of doing ministry as resources and the needs of others are taken into consideration. .

Moreover, we are asked as part of our mission to **invite and involve others** in what God is doing through the ministry that has been entrusted to us. So we encourage others to participate in our ministries in many ways, not the least of which is to support our work through financial contributions. In so doing, we receive not only a person's contribution, but their active investment in our mission as partners in Christ's work. As stewardship, fund raising has strong missional implications. It is an invitation to others to live from their hearts.

Fund raising is “a person with a cause asking a person of concern to share in responding to a human or social need.” (Henry Russo)

Fund raising as stewardship is comprised of the following dynamics:

1. A theological understanding of the mission of the organization and the reason for inviting others to share in its mission.
2. Fund raising is essentially friend raising.
3. An ongoing process of interpreting and extending the mission of the ministry.
4. An annual assessment of the ministry's goals and needs.
5. Fund raising is not charity or begging. It is a genuine invitation to others to share in the mission of the organization and to help support it financially.
6. The building of linkages between the leadership and potential donors.
7. Remembering that stewardship is both taking care of the donor and taking care of the gift.
8. A means to continually identify those who support your ministry (sometimes called your "constituency") and to invite them to participate with you in your mission to the university community.
9. The recognition that organizations do not have "needs," they have visions and solutions, which people of *interest, ability, and means* can be invited to share.
10. Enlistment of quality leadership and volunteers.
11. The recognition that money is a means of exchange between the contributor and the

- organization. What are you asking for and what do your donors get for what they give?
- 12. Understanding the principle that people generally do not give to causes but to *people* with causes.
 - 13. A process of building a strong donor base by a) obtaining the gift, b) repeating the gift, and c) increasing the gift.
 - 14. Identification of that critical 10% of the donors who have the capacity to give 90% of the gifts in any major fund raising campaign.
 - 15. Keeping accurate records that identify donors and express appreciation for the gift received.
 - 16. The knowledge that the right time to ask for the gift is when the ministry needs the support to meet a *critical human need* that is *urgent, relevant, and important*.
 - 17. The needs of the ministry must be put in personal terms that indicate how a difference will be made in someone's life. These are "do or die" priorities. Your ministry is about changed hearts and saved lives.
 - 18. Awareness that annual giving, a major capital campaign, and planned giving are interrelated and significant alone as well as in their relationship to each other.
 - 19. Gift Planning (as opposed to "planned giving") is how this inter-relationship of campaigns is described today. Every ministry, no matter how large or small, should have a plan for asking for and receiving a variety of gifts in a comprehensive way.
 - 20. The possibility of asking a potential donor for a contribution is governed by what is often called the "Rule of Rights." It seeks the right **person** to ask the right **donor** for the right **amount** at the right **time** for the right **reason**. If you consider your gift planning process and can substitute the word "wrong" for any of the "rights" above, you are not ready to proceed.
 - 21. It is essential to tell the story of the ministry (rather than merely soliciting funds) and how the ministry has been faithful in meeting human need and changing lives. It is a perspective that develops something for people that *they* want to do. Sometimes this is called "marketing," but the church calls it "sharing the story and inviting others to live into it with you."
 - 22. Involvement of others in leadership roles because of what they bring to the organization. Often these gifts are described as "wisdom, work, wealth, and wallop."
 - 23. Being an organization worth funding.

"The one thing you know about the Salvation Army is that when you give your time and money, it's going to make a difference in someone's life"

(Quoted in an article about the Salvation Army in Northwest Airlines in-flight magazine, World Traveler, 11/96)

Create a Mission Statement

The Mission Statement expresses the core reasons for the existence of your ministry. It attempts to state in clear and concise language the dominant, core values of the organization in ways that will attract the attention and involvement of others. It is both theological and practical. It defines human needs and invites others into a plan for meeting those needs. It is relational and affectional, rather than rational and detached. It is the banner of your ministry that can be seen and recognized from some distance. Yet it is so well known and internalized by our leadership and supporters that it can be recited easily by anyone at any moment. It is the compelling definition of who you are and why you exist as an organization.

The Mission Statement is filled with value-laden language. It is a heartfelt response to the question: "Why does your ministry exist?" It identifies the human, social and/or spiritual needs that are central to the core of the organization and explains why these needs must be addressed. Missional language is different from goal-setting language and from language used to describe the objectives of an organization. Mission statements explain *why* you are doing what you are doing as a campus ministry. It wants to know *why*, as an organization, you are taking up time and space. Henry A. Russo, well-known fund raising expert, has suggested that whenever the infinitive form of the verb is used in phrases e.g. (to eliminate, to feed, to minister), the statement becomes a statement of a goal, not a statement of mission.

Goals concern themselves with answering the question: "What is it that you want to accomplish?" They complement the mission by stating the means to address the need. They provide a road map. They prod and push us into the future. They describe the future plan of action, such as, "We seek to carry out our mission in these three ways."

Furthermore, objectives form the specifics of the goal, stating the answer to the *how* of the question, while programs are activities within the plan of action. In summary:

MISSION:	WHY does your ministry exist-which needs drive it?
GOALS:	WHAT are you going to do about it?
OBJECTIVES:	HOW are you going to accomplish these things?
PROGRAMS:	What are the measurable MEANS to accomplish them?

Russo offers two examples of effective mission statements:

"There is no greater gift to the future than a generation of young people who are empowered with leadership skills and deeply committed to employing those skills in their local, state, national and global communities. The challenges to our society require leadership that is ethical, sensitive and aware of the needs of people and the environment. Without this leadership our future as a nation and as a world is in peril."

"Hunger hurts. It denies dignity, lessens human energy, erodes community stability and impairs the potential of people and societies to achieve. Long the land of plenty, America now faces a crisis of

hunger. An increasing number of its citizens are without food for the first time in their lives. For those of all ages who now confront hunger, sustenance must be provided and solutions must be sought.¹

Examples of missional language taken from a variety of other statements, some good and some not so good are:

- "Diversity is valued, power is shared and unanimity is sustained."
- "We are in the midst of one of the most profound intellectual revolutions in our time."
- "This is a critical juncture in history."
- "Through an alliance of resources and dedication by those who serve, these needs can be met."
- "Innovation, renovation and growth."
- "Reaching out to everyone."
- "There is no greater gift to the future."
- "It is satisfying to know that we are making a difference."
- "The cultivation of human potential and dignity is crucial to the survival of our culture."
- "Theatre exists not only to mirror life but to leave its mark on time."

Centering Statement

Often a "centering statement" is developed from the core of the mission statement. It is usually a memorable line or slogan, perhaps like a bumper sticker. It is easily remembered and used extensively to "brand" the organization in all of its literature and interpretative work. It is simple enough and focused enough to be easily memorized by everyone involved in the ministry. It is short enough to be printed on the back of a business card or recited to someone on an elevator before they reach the 10th floor. "Reach out and touch someone," was used successfully by a telephone company a few years ago. A school for children at risk in Pennsylvania issues the call to, "Find the smallest and poorest children and help them."

When writing a mission statement, remember that "people give to people with needs." They do not give to crises or budget cutbacks or staff shortages. They will not support an approach that focuses on problems or states the case in negative terms. They will respond if you invite them to participate in your vision, as it describes meeting the needs of people. Begging may elicit sympathy, but vision calls for a more positive response. Mission statements should be written with this in mind.

This information has been edited and expanded from original material contained in the *First Monday Report*, issued from 2001 to 2010 by Campus Ministry Advancement of the Evangelical Lutheran Church in America, under the authorship of the Rev. Galen Hora. These documents may be copied and used by local ministries, provided appropriate credit is given.

¹ Henry A. Russo, *Achieving Excellence in Fund Raising*, p. 40-41

Building Your Donor Base: Friend Raising and Fund Raising

As I move about the country and talk with campus ministry staff and board members, I frequently hear the same question stated in a variety of ways. “How can we get more people to give to our campus ministry?” “How can we grow our mailing list?” “My predecessor didn’t leave any records behind, how can we find our ‘lost’ alums?” “There just aren’t that many Lutherans in these parts, how do we expand on the few we have?” “We have a lot of people on our mailing list, but not many of them give. What can we do?”

These kinds of questions are all reflections of a significant issue for campus ministry fund raising. They address the problem of maintaining accurate, viable lists of supporters to whom we can go for sustaining gifts (annual fund) or larger contributions during a special campaign. The issue is this: how can we develop and maintain a circle of friends of the ministry who will become donors consistently and at critical times?

Let’s begin with several observations. First, not every name on a list will be a contributor. They may like to receive your newsletter, but your ministry isn’t among the top causes to which they give. They have other interests and commitments at this point. Which is to say that part of your work in fund raising is to get their attention and make the case for why your ministry *should* be among the ones they fund. Don’t despair. They are on your mailing list and haven’t returned your mail—yet. They read your newsletter like someone quickly paging through the morning paper with coffee cup in hand. They will stop to read an article when it catches their attention. Until then, they will just be on your list. In the meantime, think about what you might do to make them put down the coffee cup and pay attention.

Second, people need a reason to give. And those reasons vary from person to person. Some will give because it’s a family tradition to give to causes. Some will give because of faith concerns—they do so in response to God’s graciousness in their lives and they want to help others. Some will give as a civic duty or because it’s good for business. Some will do so because the ministry you represent has touched their lives. What you are trying to do in your communication with them, by mail, phone or in person, is give them a reason to give to your cause. What makes your ministry concerns urgent and relevant for these potential donors? What are their interests? What is the payoff for them?

Third, fund raising is not about money; it’s first and foremost about building relationships. At its best, fund raising is friend raising. If you have received a gift, but you have not deepened your relationship with the giver, you have some relational work to do. Did you thank the donor promptly and sincerely? Did you make them feel that their gift was important? Through this gift exchange, did you connect the wishes of the giver with the central purpose of your ministry? There is a lot of talk in development circles these days about “stewardship of the donor.” It means that we need to see beyond the gift to the person who gave it and find ways to build an ongoing relationship with the donor that is mutually rewarding.

Now, on to the concern for building a database. Regardless of how many names you have in your computer, you are always looking for more. Where do you find them and how do you incorporate

them into your gift planning process?

We think too narrowly, at times, about who might qualify as a potential donor. In campus ministry circles we think about student alums, first and foremost. That's problematic, especially for those ministries with scant records or fewer participants. Alums are probably the best potential donors, since they know our ministries best and have been involved at some level during their time on campus. But they may slip away from us too easily through address changes or lack of contact. An alum who has been out of the loop for many years is not a very good prospect, unless you go to a lot of effort to re-involve them in the ministry. Also, as people move on in life, their interests change. They may find new loyalties. They not even be a member of your denomination any more. Keep your alums on your database, for sure. But know that unless you keep in touch with them they may slip from being close friends to simply be distant observers.

It might be helpful to think about developing and expanding your supporters using the image of concentric circles. At the center would be those who know you and love you best. This would include current and past board members, some alums, and faculty and staff with whom you have had frequent contact. The next ring might be leaders and pastoral staff of local congregations of your denomination. Another ring would include parents of students and other denominational connections in general. Still another ring might include friends of current donors, ecumenical partners, area businesses and philanthropic individuals in the greater community. Who knows and cares that you and your ministry exist? Or who might potentially care if they were given information or invited to see your ministry in action? Again, reasons will vary.

Some will care because you are a ministry with gospel implications. Some will care because you are attending to the needs of vulnerable students. Some will like it that you are engaging faith and learning. Some others will be likely to support the work you do to open the wider world to students through servant trips and volunteering. A point I am making is this: anyone can become a supporter of your ministry if they know what you're doing and come to care about it. It's about friend raising rather than fund raising.

I encourage you to think creatively about who you might add to the outer circle of your constituents. Some prospects might be:

- ✓ People who live nearby
- ✓ People who are new to the university
- ✓ People who work at the university as support staff
- ✓ People who give to similar causes
- ✓ People who volunteer
- ✓ People attend events or respond to invitations
- ✓ People of influence or leaders in the community
- ✓ People who are suppliers or work for them
- ✓ People who are interested in lectures or attend campus events
- ✓ People who live out of town, but have local connections

Another way to think about developing your constituency base, rather than in concentric circles, is to plot out a grid. Along the vertical axis will be the expected response. It will begin with a low of returning a card or attending an event. A middle level might include volunteering or serving on a board

and making some kind of entry-level gift. A high response would be giving a gift of some significance and close involvement with the ministry. On the horizontal axis would be the ways in which you and your ministry respond to the individual. A low-end response would be an occasional mailing or invitation. A middle level response might be a phone conversation, a lunch meeting, or some kind of personal appreciation for gifts given. A high level response would be public recognition of a gift, more consistent personal interaction and ongoing involvement with the ministry at decision-making points.

A higher expected response from potential donors means a higher level of interaction and relationship building on the part of the ministry. A low level contact, such as an occasional newsletter, will not be enough to sustain a relationship with a person from whom you expect a high level response. A telephone call might nudge a gift, but probably not a significant one. Before potential donors will give significantly to your ministry, they must know of you, love what you do and be involved at some important point in participation or decision-making.

Henry Russo, in his classic text on fund raising, quotes the wisdom of Paul Wisdom. “Prospects must learn a good deal about the institution, its programs, and its people before they will support it. They need to know what it is, why it’s important, its quality, what it will do for them and for others, and why the institution needs their support. Conversely, the fundraiser also needs to know a great deal about prospects in order to maximize chances of success. . . . A recent national survey of senior development professionals and consultants suggests that an average of nine separate cultivation activities should take place before a major solicitation. The cultivation can take place in a variety of ways and settings. . . . The nature and style of these events depends on the ongoing research that determines the interests of the prospect, what he or she might or might not attend, what might entice an interest and what would not. All of these events are designed to develop a good person-to-person relationship that ultimately will bring success.”¹

It is certainly some kind of “ultimate success” that drives most of our fund raising and friend raising efforts. We want to successfully raise enough money to keep our doors open and our programs running. From time to time we need those larger gifts that will provide for new or renovated facilities. I encourage you to think about success when you seek to broaden your base of support or deepen the relationships you have with your real and potential givers. Make those persons more than a name on a mailing list or a signature on a check. Invite them to make a connection with your ministry that is enhancing for both you and them. Develop the friendship as you develop the funding.

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¹ P.E. Wisdom, *The President and Fund Raising* (Washington DC: ACE/Macmillan, 1989), quoted in Henry A. Russo and Associates, *Achieving Excellence in Fund Raising* (San Francisco: Jossey-Bass Publishers, 1991), pp. 178-180.

THE ANNUAL OR SUSTAINING FUND

The annual fund is the cornerstone of all the fund raising efforts of your campus ministry. Sometimes it is referred to as the “sustaining” fund, because it literally sustains your budget from one year to the next. It is through this regular, ongoing appeal (more than once a year) that your “universe of donors” gets to know your mission and begins to feel connected to it. Sustaining fund appeals keep the doors open and the welcome mat out. Fund raising is NOT about money; it’s about relationships. And it’s through the annual/sustaining fund process that vitally important relationships are established, nurtured, and sustained. Like regular communication with family and friends, the sustaining fund seeks to maintain close contact with your most faithful donors and invite them to continue to support your ministry.

In campus ministry the sustaining fund contact list typically consists of a wide range of names and addresses, probably collected over many years of contact with a large variety of people. On a typical sustaining fund list will be:

- Alums who were former students active in the ministry
- Faculty and staff, both current and former
- Parents of students, both current and former
- Members of local congregations who have expressed interest
- Board members, both current and former
- Former staff members
- Synodical leadership, including area pastors and AIMs
- Other friends who have supported your ministry over the years

The contact list should be as expansive as possible and kept current by printing “address service requested” below your permit number. There is a per piece charge for returns and/or corrections, but the price of retaining a valued donor is worth the cost. In this highly transient society, as much as 10% of your database may change between mailings. So although there may be some work and expense involved, it pays to keep your donor prospect list as accurate and active as possible. You can’t afford to lose friendly donors. Also, it will help if you have software that will allow you to sort your data into categories that will permit you to send first class mail to contributors and third class mail to all others. A rule of thumb is that once someone has given a gift to your ministry, you should not send them any mail again that is not first class.

The basic principle in the fund raising world for operating a sustaining fund is simple: “get the gift, repeat the gift, and increase the gift.” The sustaining fund seeks to open the door for new contributors, invite those who have given to do so again, and ask those who have consistently been generous to be even more so. Later, as you put in place your capital/endowment campaign, it will be from this group of consistent, supportive givers that your best large gifts will come. These friendly givers are your best cheerleaders and the sustaining fund builds on these essential relationships.

Before you can begin a sustaining fund there are several things to put into place:

1. A mailing list of potential contributors that is accurate and up-to-date.
2. Computer software to support your needs.

3. A specific budget item for this ongoing venture
4. A committee that is trained and willing to work with you.
5. Carefully written and edited interpretive material.
6. A list of positive, significant ways that people can contribute to your ministry.

Even though case statements and feasibility studies are usually done for larger capital or endowment campaigns, it may be useful for those leaders guiding the sustaining appeals to develop a “case” for the contributions you are seeking, if for no other reason than it provides a way for you and your leadership to agree on the need for the fund raising efforts.

Likewise, a “chart of gifts” is usually done for a larger campaign, but might have application for your annual fund. This chart lists how many gifts can be expected at what levels. For example, in larger campaigns, two gifts might represent 80% of the goal or more, while in an annual fund it may take many more gifts to reach 80%. Big gifts are still very important in smaller campaigns, and it means spending more time with this select group of donors. In an annual fund, this may suggest that there will need to be some personal contact above and beyond a simple mailing. The typical giving pyramid becomes flatter, recognizing that smaller gifts are what support the sustaining fund. Moreover, you will need more prospects to secure the larger gift (prospect-to-donor ratio of 5:1) than for the smaller gifts (2:1). This does not minimize the smaller gifts, but helps you realize the amount of time and effort needed to invite the larger contributions.

A Gift Range Chart for a \$60,000 annual fund, using this ideal model, is as follows:

Gift range	# of gifts	# of prospects	\$ per range
\$3,000	2	10 (5:1)	6,000
1,500	4	20 (5:1)	6,000
750	12	48 (4:1)	9,000
600	18	72 (4:1)	9,000
250	24	72 (3:1)	6,000
100	120	360 (3:1)	12,000
under 100	400	800 (2:1)	12,000
(\$30 av.)			
	580 GIFTS		\$60,000 TOTAL

There is a wide range of opinion today about several issues related to sustaining fund appeals. Some advocate the use of “giving clubs” that challenge donors to respond at a certain level and maintain or increase the size of the gift from year to year. Others think that this creates false hierarchies and discourages some smaller gifts, while lifting up the larger ones. You decide.

Some suggest making the appeal in terms of what a certain dollar amount will purchase for the ministry. For example: “A gift of \$100 will send one student to a retreat or purchase Bible study material for one term.” This approach, they say, will allow individuals to give to specific programs or projects that are of interest to them. Others suggest that this kind of laundry list is too crass and places too much emphasis on “what my dollar will buy.”

When solicitation letters are written, some suggest that they be brief, crisp and bold. Others suggest that you take as much space as you need to say what is important, thinking that if people are interested in what you are doing, they will take time to read about it. In either case, keep your letters as personal as possible.

Some are adamant that there needs to be a return card and envelope in every piece of correspondence. Others say to be selective and not to include these in thank you notes, for example. Perhaps this is another reason for stratifying your database, so that only certain categories of donors receive the repetitious return cards—those who have used them in the past.

These are all items that will need to be discussed by your local committee and the best judgments made for your ministry in your situation.

Although the sustaining fund is often called the “annual” fund, the gift planning process should include ways to be in touch with your “universe of donors” several times a year. Perhaps there could be a special newsletter sent to them twice a year, or a special event to which they are invited on a regular basis. One letter or newsletter sent once a year will not do the trick, especially if it is poorly done and impersonal. Since fund raising is essentially relational, you will need to find creative ways to keep in touch throughout the year. Pick up the phone. Send photos. Invite feedback. Involve students. Make connections as personal as possible.

Pledge cards may be used for sustaining fund appeals, particularly if you are asking for significant amounts of support. However, if pledge cards are used, keep them updated. People do not like to be reminded to remit a pledge that they may have already paid. Offer to remind them when their next pledge payment is due—it will give you another opportunity for contact.

More and more these days, donors are looking for ways to simplify their giving. Electronic transfer is one good option, such as the Simply Giving program offered by Thrivent Financial for Lutherans. With a minimum of administrative detail, organizations and donors enroll through Simply Giving to make monthly, quarterly, semi-annual, or annual gifts through electronic transfer. For more information go to: www.thrivent.com/community/outreach/giving/simplygiving Most denominations will have some kind of electronic giving method in place; check out what your church body has to offer.

There are a variety of ways of reaching people to ask for their support. Obviously, the more personal the contact can be, the more effective the results will be. But time and distance usually drive us to a less-personal means, such as bulk mail, e-mail, or phone calls. Professionals in the field have developed the following “chain of effectiveness” list, moving from the most to the least effective.

- A. Person to person conversation
- B. Personal phone call
- C. Personal letter
- D. Personalized letter, such as one with a handwritten P.S. at the end
- E. Impersonal phone call
- F. Impersonal letter
- G. Special fund raising event
- H. Door to door “cold” calling
- I. Media advertising

Note #1: in a highly impersonal society, it is now believed that a phone call is better than a letter, even with the current trend of phone solicitations by telemarketers. Perhaps the best approach is a combination of a letter and phone call, especially with faithful, current givers.

Note #2: while e-mail was once the preferred way to send inexpensive, instant messages, the communications field is changing rapidly. Many recipients now consider e-mail very impersonal and would prefer a voice message or a Facebook connection. Active, up-to-date Web sites are a useful way to share stories and photos. Also, it is relatively easy these days to provide a “donate online” link. The key factor is how you lead your constituents to your Web site and how you engage them in the information that you have posted.

Finally, find a way to say “thank you” quickly and personally. It is very likely that the chance of a repeat gift hinges on the way that you express appreciation for the current gift, however small. Again, the goal of the sustaining fund appeal is to “get the gift, repeat the gift and increase the gift.” Friends of your ministry will want to know that what they have done by sending a contribution is genuinely appreciated and carefully used. A prompt, personal note from you or from someone representing your ministry will go a long way to continue and sustain your relationship with each cherished contributor.

PUTTING A WRAP ON THE ANNUAL FUND

While the procrastinators among us are still hustling to get their fall mailing into the hands of their eager donors, many have begun to hear from those donors and have even responded in a timely way with appropriate “thank you” notes or phone calls. Assuming that “Aunt Martha and Uncle Harry” (how I prefer to think of donors in a more personal way) have been generous with you again this year, what are some things that you need to attend to as the year winds down?

1. Remember again the importance of saying “thanks” sincerely and soon.

There is nothing that dampens the spirit of generosity with which a gift was given than a poorly crafted, late arriving note that is impersonal, or heaven forbid, a note that was not sent at all. Reaching back to the March, 2005, First Monday¹, here are some things to consider as you say “thank you.”

- ▶ Give your “thank you” substance. You have more to say than two little words. Let your donors know how their gift will make a difference.
- ▶ Send the note now. This helps the donor know that the gift has arrived and that it will have immediate significance.
- ▶ Keep the notes fresh. Don’t just re-date the one from last year. Mention contemporary events. And if a person sends multiple gifts during the year, vary each note in response.
- ▶ Involve board members. They can be helpful in crafting the notes and may be able to add personal comments if they know the donors.
- ▶ Use the telephone. Instead of calling donors when we want something, how great it would sound if we called especially to say thanks. The telephone is more personal than mail and should be used particularly when larger gifts are received.
- ▶ Keep people informed. Use a line or two in your note to state specifically how gifts from this year’s annual fund will sustain the ministry. A knowledgeable donor is likely to become a continual donor.
- ▶ Make it a big deal. Find a way to engage donors beyond the annual ask. Include them among the recipients of your newsletter or online communications. Send a photo. Invite them to the Lutheran Center for a special event. And be sure that all of their contact information is up to date.

2. Update your database. There is no time like the present to be sure that information received from your annual fund mailing is used to make your database as accurate as possible. When you develop a database you are building a constituency of supporters. You are “friend raising,” so you aren’t “managing data” but building a network of friends of the ministry. You will want to be deliberate about who makes up this circle of friends, what is important to know about them, and why. You will want to take as much care with these names as you would with your close associates. If “friending” someone on FaceBook is cool, doing so on your database is equally important.

Your database should include an ever-widening circle of friends, including: student alums, past and present board members, parents, pastors, faculty and staff, volunteers, congregation members, and

¹ Joseph Barbato, “Thanks, and Thanks Again, *Contributions*, April 2005, p. 6

many others who share your mission and vision.

All of these individuals are potential donors and certainly cheerleaders and friends for your ministry, because they know and understand your mission. Especially these days, you will want to keep your files updated on a regular basis, since addresses, phone numbers and email addresses change so rapidly. As you work to keep student alums in the loop, you will want to know where they are employed, if they marry, when they have families, and if there is a public notice of awards or accomplishments. Some of this information you can glean from the newspapers or church newsletters. Some of it will come from Christmas letters or personal correspondence.

This is a great job for volunteers, by the way, since they may be deeply connected with the community or the university.

3. Evaluate what you've done. As the year ends and the bottom lines of budgets are being adjusted, this would also be a good time to evaluate the effectiveness of your annual fund. Rather than letting it just become a time for hand-wringing and number-crunching, spend some time with your ministry leadership examining the strengths and frailties of your annual appeal. Here are some questions you might ask:

- Did the mailing go out in a timely fashion? To avoid the glut of similar mail that usually arrives between Thanksgiving and New Years, consider sending your mailing in late October or early November.
- Did we segment the mailing? Donors who are consistent and/or who give generously should always receive first-class mail. Was there anything extra you could have done for your core donors, such as make a prior phone call to let them know that the letter would be coming or send them a photo in the thank you note? Segmenting doesn't mean making folks into first class or second class citizens. It simply recognizes that actual, consistent donors should be treated differently than "prospects."
- Was the copy attractive, compelling, and informative? Did the envelope invite the donor to open it? Were the contents related or did it seem like a dumping ground of haphazard stuff? The letter should be friendly, specific, direct, urgent, and tell the story of the ministry well. The return envelope should have asked for updated information and provided the donor with giving options, such as size of gift, memorials, endowments, etc.
- Did we budget enough to make the annual fund successful? The old adage is that "you have to spend money to raise money." Were you able to send a color newsletter with pictures larger than a postage stamp? Were you able to send first class mail to your inner circle of supporters? While donors don't want to see you spending too much on flashy publications, neither do they want to be the recipients of something quickly printed on the office copier moments before deadline. If you budget for communications and your annual fund, you will be able to produce better copy and not have to feel that you are robbing another important program to pay for your appeal letter.

4. Look at what other organizations are doing. Invite board members and others to bring in samples of annual appeal material from other organizations similar to yours. Evaluate what you like and dislike about these materials. Let new ideas spark. If you find yourself drawn to the appeal of other groups, ask what it is that catches your attention and encourages you to learn more or make a contribution. Contact the group to see how it was done and who did it for them. Ask what it would cost and determine how that idea could be incorporated into your next communication.

5. Think outside the box. Too many annual appeals are just that—annual appeals for help, when in fact what is needed is a strategic plan for inviting and receiving contributions that are needed throughout the year to sustain the ministry. That is why in fund raising circles this yearly exercise in gift solicitation is commonly referred to as the “sustaining fund,” because the organization needs gifts throughout the year to keep the doors open and the programs running. So think of ways to make that work for your ministry. Consider sending an appeal letter several times a year at certain key times, such as before a service learning event, the end of the academic year, or for an anniversary celebration. Also, strategize about what kind of communication you are going to use: telephone, newsletter, mail, or perhaps e-mail or other online media. If you segment your donor base, do some folks receive more frequent attention or different kinds of materials?

While annual appeals sustaining the ministry over the course of the year, once you have a solid base of annual donors, who give generously and consistently, consider lifting the vision of these significant friends. Develop a campaign for an endowment for the ministry or one that will provide serious funding for facility renovation or special program needs. Your strong donors may well be looking for a strong challenge. They may seem content to send you an annual \$25.00 check, but your “best friends” will want to know how they can support you even more. Invite them into a challenge that is critical and important for your ministry. Invite their insights and their comments, especially if you do a feasibility study. Then invite their greater, ongoing support.

There is ample evidence that even in these difficult financial times people continue to give generously to those organizations and ministries that are faithful and provide donors with accurate information and careful attention. While donors may be more selective these days about which organization receives their support; nevertheless, people with grateful hearts continue to give to make a difference in ways that they can see and in which they can participate at some significant level. An annual fund opens doors for donors. Invite them into your ministry and encourage them to sustain what you do with their gifts and prayerful support.

DIRECT MAILING

A frequent question that arises in conversations about fund raising is: "If I need to do one thing well, what would that be?" The immediate response is usually about the necessity of building relationships and nurturing donors. This is often called "donor stewardship," meaning that we are concerned about more than the gift; we're concerned about the giver. Certainly we know intuitively, or from wide experience, that if we do not nurture and deepen relationships with our donors, everything else we do to build support for our ministries will begin to disintegrate. Fund raising, after all, is friend raising.

We need to consider how possible this is for most of our ministries, primarily because our alums and supporters are scattered across the country for the most part. Even in these days of electronic communication, the basic way that we stay in contact with our donors is by mail—snail mail—the old fashioned kind. Yes, the newer trend is electronic, and, yes, the more opportunities we can provide for people to meet face to face, the better chance we have to communicate our mission. However, I want to suggest that the single, most important piece of our fund raising work is still regular, systematic contact by direct mail. For most of us it is the foundation upon which all other good development work is done. Unless you happen to have a large staff, a sizeable travel budget, or state-of-the-art computer equipment, you are going to rely on direct mail to carry the bulk of your message. So how do you do that and do it well?

Steve Hitchcock, a direct mail expert and developer of the original ELCA campus ministry endowment, "We Care for the Future", keeps pushing for excellence in how we do fund raising by mail. He has written "Ten Things That Are Almost Always True About Direct Mail Fundraising." Here is his sage advice:

1. Sending out *thank you letters* or notes as quickly as possible is the single most important factor in insuring the success of your direct mail fundraising program.
2. Those organizations that raise the most money year after year have direct mail fundraising *programs*—not just a collection of appeal letters. What makes the difference is *not* the response rate or total income of any single mailing. Rather it's the total number of gifts and the overall income generated by an annual schedule of mailings—with adequate time between mailings and with a variation in the format or content of those mailings.
3. Asking your donors or members too often increases the rate at which they lapse, *but* organizations that don't send enough appeals see an even greater percentage of their members and donors lapse.
4. Fundraising appeals work best when there is a letter, a separate response card or reply device, and a return letter. All three are essential.
5. Enclosures—especially brochures—always slow down the process of getting out a mailing, increase the cost, and *rarely* generate enough additional income to justify the time and money you spend on those inserts. In many instances, enclosures reduce response rates. Of course, there are *exceptions* to this rule.

6. Testing random samples of members with variations in letters or packages (for example, testing yellow reply envelopes against a standard white envelope) almost never produces statistically valid differences in response rate.
7. Appeals related to true emergencies or a pressing crisis always brings in more gifts and more money than appeals for institutional purposes or for support of ongoing programs. However, direct mail programs that include institutional appeals—membership renewals, giving clubs and annual report mailings—have higher donor retention and higher overall income.
8. Very, very few donors upgrade their giving. The first gift you receive from an individual is likely to be the amount written on subsequent checks. In fact, many donors *downgrade* their giving levels (in other words, an individual makes an initial gift of \$100, but her next gift is only \$50). Fortunately, the precious few donors who do go on to increase their giving level can be enough to offset those who decrease their giving.
9. Your organization's donor base must include *both* "large" and "small" donors—those who regularly contribute \$1000 and those who send in \$10 bills. Fundraising is democracy in action—you have to let everyone participate at the level he or she wishes. You will bring about your own demise if you try to recruit and solicit *only* major gifts. And you must give donors the opportunity (and incentives!) to make substantial contributions; you can never generate enough net income from \$10, \$15 or even \$25 contributions to sustain your fundraising program. Okay, this rule isn't true for a couple dozen organizations—in the whole country.
10. Organizations that send out newsletters and informational mailings—not just solicitation letters—generate more income from their direct mail programs.¹

I would like to add a few more observations from my desk. Too often we rely on our newsletters to carry the weight of the "ask." While a newsletter can convey relevant and exciting programs and pictures, it is one step removed from the personal correspondence of an actual letter. The personal column we write in our newsletters is not very personal is it? Newsletters are effective as support pieces for regular personal mailings, but they never take the place of a well-crafted letter. Three letters per year, interspersed by two newsletters, might be a considered a good balance for us in campus ministry.

Another observation is that we need to make our letters as personal as possible. How can you communicate the urgency of your ministry in a way that invites your readers to "feel" themselves into your appeal? Write as though you are communicating with a close friend. Say what you need to say with passion, clarity and openness.

Remember that what you are trying to do with your mailing is get a response. So you have to ask your donors to do something: return the card and envelope with a check, complete a survey, or send names of others they know or share some advice. Involve your donors. Invite them to help you in some way or another. Keep the relationship vital and personal. Direct mailing that is sensitive, timely, and inviting will go a long way to building an expansive circle of friends that support and care for the ministry that you are all doing together.

¹ Stephen Hitchcock, Mal Warwick and Associates, Berkeley, CA

IMPROVE YOUR DIRECT MAIL PROGRAM

Spring is an appropriate time to look back over your shoulder at the past year's fund raising activities. It helps to consider what you might have done differently—like getting your mailing out earlier or planning a special event for friends and alums. It is also a time to look forward to the fall and begin to make preparations over the summer that will help you hit the ground running come September. Do you need a new brochure? Is there work to do on the database? Do you need to recruit more volunteers?

Among the many things to evaluate is your direct mail program. Are you able to chart or graph any trends that will be helpful? Can you do a gift list that will tell you who your consistent larger donors are (a tip for special treatment)? If you are receiving mostly small gifts, is there a way you could challenge your donors to increase those gifts?

Here are some ideas that come to mind for improving your next direct mail program¹:

- Prepare a new donor package to send to each new donor 2-4 weeks after receiving the gift. Include items that will help them know your ministry better.
- Spend a bit of time and money locating and involving lapsed donors. Add them to your "donor acquisition file."
- Plan to acknowledge each gift promptly, ideally within 24 hours. A thank you phone call is even better than a note.
- Remember to enclose a reply envelope with thank you letters. It will invite donors think about the next gift.
- Send different thank you notes to different donors. The larger and more consistent the gift, the better quality the note—or phone call.
- Promote planned giving opportunities regularly. Since donors have to "stop and think" about these gifts, they will be need to be reminded often that you invite planned gifts. Frequent givers are the best prospects.
- Build an entire mailing around a supportive news article. For example, if you have just returned from a successful mission trip and the local/campus newspaper carries an article, make copies and invite support for the next trip.
- Reprint news articles or an occasional letter of affirmation (with permission) in your next regular mailing.
- Enclose a photograph of a successful activity in your thank you letters.
- Offer donors an opportunity to weigh in on a hot issue, either by vote or by using a questionnaire. Be sure to send them the result.
- Tell your story with stories.
- Do an objective survey of people who have been on your mailing list for sometime, but who haven't given, to see why not.

¹ Some ideas were presented by Dennis Meyer and Bonnie O'Neill of Meyer Partners at the Seattle ALDE Conference.

- Think about the quality of your mailing—things like the kind of paper, color of ink, style of font, etc. Take a couple of mailings to other non-profits and ask them for feedback.
- Use a “handwritten” PS on your next letter. Handwriting on a printed letter is generally better read than anything else.
- Use a handwriting font or script font to address your letters. Better yet, ask volunteers to do the addressing if you are sending out a manageable number.
- Keep your message simple and direct. Focus on one or two particular programs or ideas, rather than trying to be all encompassing with every mailing.
- Avoid packing too much in each envelope. You want people to read your letter and return the gift envelope. Inserts, brochures, etc. are generally more confusing than helpful.
- Tell donors that you will mention them in your next newsletter. Then do, of course. Gift levels are not as popular as they once were. A simple alphabetical listing of supporters is just as effective.
- Repackage your appeals from time to time, but keep the “brand recognition” of a logo or theme. Don’t make it so different that your readers will think they are on a totally new mailing list.
- Study mailings of other successful non-profits to learn their “best practices.”
- If your need is urgent, ask donors to match their “largest gift ever.” Sometimes deadlines help to lift up the urgency.
- Think about the mail you receive yourself. What intrigues you? What offends you?
- What did you throw away and why?
- Direct your readers to your Web site, where you will hopefully have much more information and some recent pictures. Younger donors, especially, will go online to find out more about your ministry. These days, a good Web site serves the purpose a sign in front of the building used to serve. It’s the face of your ministry. Keep it fresh and inviting.
- Write your letter with a person in mind. Use first and second person pronouns; be friendly and informal. Avoid long sentences and big words. Don’t write an essay; write a personal letter.
- Remember that in a solicitation letter the signature is read first, then the PS, followed by the first paragraph, then special paragraphs with underlining or boxed words. It’s OK to be repetitive.

Finally, let me encourage you to involve as many people in your next mailing as possible. Invite several people to write the draft of a letter. Then compare them and use the best one, or blend them together. When the letter is in its final draft stage, have other people read it and offer their comments for improvement. Find someone who knows graphic design and ask for her/his ideas. See what your local print shop might offer before you’re ready to go to press. Consider cranking up the volume of your mailings if you can afford to. Contact once a year with your donors is not enough. If you enjoy what you do and are committed to its importance, your readers will join you in celebrating and supporting your ministry.

WRITING A FUND RAISING LETTER

In this all-important ministry of “friend raising/fund raising,” one of the primary ways to keep in touch with your donors is through the use of direct mail.

Using direct mail to invite gifts for your ministry is only part of your total strategic plan, but it is a very significant part. While you may dream about and even plan for larger contributions, direct mail may well account for those “lower end” gifts that you need to keep your ministry afloat. These donations will likely make up the bulk of your annual (sustaining) income from outside sources. Additionally, direct mail may be the primary means for you to keep in contact with a large number of your constituents, using the mail format as a singular, relatively inexpensive means to inform them of your programs and ask for their continued support. Whatever the reason, when you write that important letter, there are several things to think about.

1. Provide an opening sentence that is provocative and attention demanding.

Just as a journey begins with one step, what you long to communicate in this letter begins with one word, then one sentence, then one image, and so on. Your first sentence creates the impression of importance, excitement, or opportunity. It is the “hook” that invites the reader to follow you more deeply into the vision of your ministry as you share what their gift will provide once it is received.

2. Use images and/or stories that are compelling.

Once you have decided upon the compelling opening to your letter, you will want to establish a strong copy track (called the platform) to run on. Stories that touch the heart and tell how human need is being met by your ministry are some of the best copy tracks. People give to people with needs, not merely to programs or to brick and mortar. Your letter must take your ministry out of the abstract of ideas and place it into realistic, visual images that people can see and remember.

3. Ask for what you need early and often.

Because fund raising letters are usually read rapidly or in a spotty fashion, you will want to let your supporters know at several points what your needs are and what you expect of them. Usually by the second paragraph, and certainly by the middle of the first page, you should indicate the response you are seeking. If this is the first time you are asking a person for a gift, there is no tomorrow if your letter hits the round file. Don’t be shy; ask for what you need, but make it compelling. If you use bold face type or underlining, do so only in a couple of places in the letter, so that the reader’s attention focuses there and not everywhere.

4. Let your readers know how their gift will make a difference.

Good fund raising letters usually have one succinct paragraph that lays out the case for your ministry: the need, what will be done to address it, and how the donor’s gift will help. Describe in concrete terms how needs will be met and lives will be touched by the gift you are seeking. This will help the contributor feel as though they are present with you, involved in the action, and sharing directly in the ministry.

5. Be as personal as possible.

Imagine writing to your Aunt Martha or to a longtime friend. Treat each person on your mailing list as the real person they are. Let them know something about you. Connect with their questions and their dreams. Be human, be real, and let them be real to you as well. In their minds who you are and what you represent establishes the integrity of your ministry. If you are new or unknown to most readers, perhaps you will want to have the letter written or co-signed by someone who is more familiar to them. Take a few sentences to introduce yourself (but not in the first paragraph.)

6. Write with urgency and expectation.

When your letter arrives in the mailbox, somehow it is going to have to attract enough interest and attention to rise to the top of their reading list. Make your cause bold, important, and significant. Tell why your need can't wait and why the response from this reader will make all the difference. Appeals for support are more than talking about "needs." They are invitations to help find a solution or provide needed resources or life-changing experiences. Give your readers an opportunity to respond to a very real situation, knowing that their gift will make a difference. Why must what you propose be done now and not delayed.

7. Highlight how others are involved.

Lift up your students and board members and show how others are actively involved in working on the needs you mention. Active board members indicate a cause they are willing to serve (and contribute to). Volunteers show that the public has found your cause worth supporting. A story line about peer ministers shows how committed students help to expand the impact of the ministry.

8. Give your reader a reason to trust your organization.

People want to believe that what you tell them is reliable. They want to know that you are reputable and will use their gift carefully. Refer to your current successes or your careful financial management. Remember, writing a check is an emotional experience. Give your supporters the assurance that they can trust you.

9. Describe the solutions as attainable and manageable.

Most people are not excited about contributing to a large general fund with needs that go on forever. In this letter you should explain how specific goals can be reached and how gifts, whatever the amount, will help to reach these goals. People need to know that their check will make an attainable difference when added to the contributions of others who share the same vision.

10. Help your donors to be hopeful.

Regardless of how urgent and important you portray your need, your supporters need to have hope that change can happen, problems can be solved, and needs will be met. Is there light at the end of the tunnel? Give your donors a sense that there will be a permanent solution, not just an empty bucket that has to be filled forever. Help them to see that beyond the immediate needs there is more creative, significant ministry that will happen. Their gifts can truly help this vital mission of the church "care for the future."

11. Be informative.

Although giving is emotional, it is also based on information. Are there facts that can be shared, statistical trends, or new ways of thinking that your supporters might like to know? Why are your

particular programs offered? What has the response been? If there are “sticking points” or problems, let them know that too, and ask them for possible solutions. If you truly want people to be involved in your ministry, you will need to keep them informed. Although there are some differences of opinion, most successful fundraisers now agree that a longer letter is better than one that is too brief. The reason they give is that any potential donor who wants to be informed needs a longer copy with more information and will spend the time to read it if it is well-written and helps to provide good information. The *right* prospect loves to read about something in which they are already interested. The *wrong* prospect may not even open your envelope.

12. Show appreciation.

Take time to thank your donors, expressing your appreciation in advance for what you hope they will do—even for considering the possibility of giving. If you are planning an event or interesting program that is open to more than students, let them know that they are invited. You may not receive a gift on the basis of a first letter, but an invitation to an event where they can rub shoulders with other committed supporters may be just what they need to see the opportunity themselves.

Donor Stewardship

Benjamin Franklin had it right when he wrote, "Apply to all those whom you know will give you something; next to those whom you are uncertain whether they will give you anything or not, and show them the list of those who have given; and lastly, do not neglect those who you are sure will give nothing, for in some of them you may be mistaken." In other words, ask everyone to support your good work, but each of them in a different way and with different expectations.

Stewardship of donors is big talk these days in fund raising circles. Someone has finally noticed that it's as important to take care of the donors as it is to steward their gifts. Since much of the emphasis in larger campaigns is on the will of the donor, it makes sense to involve them as much as possible every step of the way. And when you find yourself in between campaigns, it's a very good time to reach out to your best donors and keep the relationship with your ministry alive and strong.

Potential donors to your larger causes are not different from those who give to you frequently. The size of the request may have changed, but the relationship should not. In fact it should become stronger. The larger the potential gift, the stronger the bond should be with the ministry (and with you, the ministry's key spokesperson). In a typical campaign you can expect to spend a significant amount of time with several key donors, persons who are at the center of awareness and involvement in your ministry. The Indiana School of Fundraising says that "linkage" is more important than "ability" or "interest" when it comes to larger gifts. So if you spend 75% of your time with major givers, that's about the right amount.

My analogy usually is that nurturing donors is like "keeping in touch with Aunt Martha." You care about Aunt Martha. And if you want her to care about you and know what's going on in your life, you will be in touch more often than once a year at Christmas time. You'll write her notes, send her pictures, call her occasionally, and invite her to visit on important occasions. And, if this doesn't sound too crass, you will spend more time doing that if you're going to ask Aunt Martha for a rather large favor. She loves you; she just needs to hear from you often and know that you care about her too. That's donor stewardship. Fund raising is, after all, friend raising.

Here are some ideas about how to build stronger relationships with your core donors:

1. Hand-write your thank you letter or call on the phone no longer than 3 days after receiving the gift.
2. Send an occasional photograph
3. Invite them to your campus center for worship or a big event
4. Keep them on your regular mailing list. If you send a newsletter, put it in an envelope and send it first class.
5. Send them cards at important dates in their lives
6. Occasionally send them a copy of an interesting article that pertains to your work, especially if you wrote it.
7. Create a special recognition club for your top donors, but be careful not to be too exclusive
8. Always use first class postage (better, commemorative stamps) for all their mail and have someone with good writing style address the envelope. Don't send mail with a label to your top donors.
9. Review quarterly the giving histories of your top donors. Know as much as you can about other organizations they give to and what their special interests are.

10. Invite major donors to serve on your board, if they have the skills you need. Perhaps an honorary or advisory board would be a better match for some.
11. Invite donors to accompany you on delegations or special trips.
12. Involve major donors in visitation to other potential major donors.
13. Call or write donors and ask for their advice, perhaps using a survey or opinion poll.
14. Don't be afraid to let donors know if you have a real emergency. They're family and they will want to know if you have urgent needs. It's OK to ask for an add-on gift to their current pledge if they are particularly close to your ministry. Help them understand what it takes to keep your ministry going.

Maybe the best way to think into this is to put Aunt Martha's hat on your own head. Think about the organizations you are close to. What has kept you close? What do you like to know and how do you like to be treated? How could that organization personalize their relationship with you more that would make you feel closer and more committed? Is there anything you wouldn't want to know? How would you like to be asked for your next gift?

Spend some time with those who care about your ministry. You'll be glad you did.

Consider a Phonathon

Consider using the telephone as a way to invite new or continuing gifts for your campus ministry. While one of the cardinal rules of asking for gifts is that the request should be as personal as possible, a face-to-face visit with every potential donor isn't always possible. So it might be within the realm of possibility to think of contacting them in the next best way—by phone.

There are some problems, of course. The overwhelming number of telemarketing calls we get these days is one problem. Answering machines and caller ID devices that screen calls are another. But think about it, in these days of electronic communication, which is often impersonal and mechanical, wouldn't it be great to hear a cheery voice on the phone, perhaps even someone you know, inviting you to be part of something you are both very committed to? It could be a highlight of your day. Well, maybe you would at least listen through the end of the conversation.

There are generally three categories of donors to involve in a phone conversation:

- People who have not made a gift to your ministry, but might if they had more information and a personal contact.
- People who are current donors, who you would like to ask for an extra gift.
- People who are lapsed donors, who have not given in the past two years, but who might if they were only asked.

How do you know if a phonathon is right for your campus ministry? Here are things to consider:

1. Requesting contributions by phone is most effective when contacting persons who have already contributed to your ministry or who have close contact with your ministry (e.g., former students who were active in the ministry).
2. Do you have enough prospects to make it worthwhile? (For example, if you have 200 names, you will probably be able to reach 60-70% of those you call and 25-30% of that number will make a gift or pledge).
3. Will the phonathon be fun? Unless you have more than 200 persons to call, you won't have enough volunteers to develop a group spirit and there won't be enough of the exciting Ayes@ responses to share with the larger group.
4. Do you have enough volunteers? About 50% of those who say they will come actually show up on the night of the phonathon. Recruit one volunteer for every 20 prospects, so for 200 potential calls you will need 10 callers (but invite 20).
5. Do you have access to a phone bank? Real estate offices, travel agencies, law firms, banks and insurance companies are sometimes willing to donate their phones for such purposes after hours.

6. Can you conduct your phonathon at the best times? The months of October, January and February tend to be the best. Calling between 5:00 and 9:00 in the evening finds most people home, but you have to counter the tele-marketers. A letter in advance saying that you will be calling on such and such a date will be helpful in that regard.

Of course, not everyone you talk with will make a gift on the spot. Generally, 5% of people asked for the first time will contribute. If they have been or are donors, that percentage moves up to 15% to 25%. Some will ask that you send them more information—which you should be prepared to do. Some will simply say that they will send you "something," which they might, if you send them a follow up reminder quickly before they forget that you called.

Kim Klein, writing in an article online for *Grassroots Fundraising.org*, says that there is an effectiveness scale to consider when designing your phonathon. The list runs from the most to the least effective.

1. People who give generously to your organization call their friends to ask for a specific donation for a specific program element.
2. People who give generously to your organization allow others to call their friends and use their names to request a donation.
3. Volunteers or staff (who give money as well as time) call people who have previously given a donation and ask for another one. The volunteers do not necessarily know the people they are calling.
4. Volunteers or staff make phone calls during a scheduled phonathon, which has been publicized so people expect to be called.
5. Paid phone solicitors call people who have previously given and ask them to give again.
6. Paid phone solicitors call people who have never given, but who have been deemed good prospects.
7. Volunteers call people who have never given, but who have been deemed good prospects.
8. Poorly paid phone solicitors call people at random.
9. Poorly trained volunteers call people at random.

Usually, Klein says, phonathons are satisfied with numbers 8 and 9 and wonder why the effort wasn't successful.¹

If you decide to conduct a phonathon, here are some things to incorporate into your planning:

- ✓ Set a date with enough lead time to do proper planning. Be aware of community events that might conflict, such as, TV shows, church programs, etc. Calling mid-week from 6 to 9 seems best.
- ✓ If you are using volunteers, select them carefully and train them fully. You will need to recruit 1 volunteer for every 20 prospects. So for 200 potential donors you will need 10 callers, but invite 15 just in case some don't show up.

¹ The full article can be found on the web at www.chardonpress.com. It is archived in the Grassroots Fundraising Journal as April, 1999, Volume 18, Number 2.

- ✓ Cell phones are a great asset to phonathons, allowing for flexibility and relatively inexpensive arrangements. While some volunteers may want to make the calls at their leisure, having a group of volunteer callers in the same proximity adds to the excitement and, frankly, the accountability. Bringing in a special bank of land line phones for the event will add to the overhead costs. Often businesses will make a bank of phones available as a special contribution.
- ✓ Have all materials ready, such as pledge card forms, pencils, prospect lists and phone numbers.
- ✓ Ask volunteers to arrive an hour beforehand, giving you at least 30 minutes for training. Practice making calls with each other to lower the anxiety level.
- ✓ Provide a loose script for the caller to follow, with possible responses to donor questions. Try to anticipate these questions so that your callers aren't left stammering into the phone. The script should contain the following:
 - An introduction
 - An explanation of the program you are seeking to fund
 - A request for a gift or a pledge, with either a suggested amount or a range of options. If possible, indicate by the person's name the amount they gave last and use that as a benchmark to continue or increase the gift.
 - Possible responses to the donor's questions or objections
 - A repeat request, if necessary
 - Verification of name, address and pledge amount
 - Words of thanks, even if no gift is given.
- ✓ Send thank you notes or follow up pledge cards with the next 48 hours. Each day of delay decreases your total by about 10%. The volunteer can write their own thank you note or attach comments to the one you are sending.
- ✓ If the line is busy, the caller should redial the number several times before giving up. A message left on an answering machine is of little value, even if the volunteer intends to call again within a few days.
- ✓ Phonathons should be fun events. Provide snacks and drinks. When the event is over you might give out prizes or appreciation gifts to your volunteers.
- ✓ Although it takes more time and money, consider letting people know in advance that you will be calling them. A note in the mail one week in advance can prepare them for your call. Then, if you were not able to reach them on the night of the phonaton, send a "sorry you weren't home when I called" note. Tell them how generously people did respond and ask that they still consider a gift by using the enclosed envelope.

Consider a phonathon. It's more personal than a letter, because it involves conversation. It's almost as quick as e-mail. And you will be sure that the person got your message instead of just hitting the delete button. Pick up the phone and invite others to join you. It can be a rewarding experience.

This information has been edited and expanded from original material contained in the *First Monday Report*, issued from 2001 to 2010 by Campus Ministry Advancement of the Evangelical Lutheran Church in America, under the authorship of the Rev. Galen Hora. These documents may be copied and used by local ministries, provided appropriate credit is given.

READY, FIRE, AIM

Remember how long those drives with your parents seemed to be when you were younger? In the days before in-car DVD players and iPods, crunched between your siblings in the back seat, dying of thirst and having to make a bathroom stop, it seemed like you would NEVER get to where you wanted to be. Even when Dad said, “Half the fun is in getting there,” you figured that was only because he was in the driver’s seat. Planning, preparation, and patience were adult virtues. As a kid you were overwhelmed with feelings of boredom, desperation, frustration, and sometimes panic. Given the choice, you might have chosen to abandon the enterprise and just get out and walk to Grandma’s house.

Finding ourselves in the middle of a fund raising campaign can often feel like the catastrophic car ride of our youth. It seems like it will never end and that we will never get to our goal. Those old feelings of frustration, desperation, and panic envelop us and we would rather cut the trip short and settle for what we have in hand, rather than push along to the bitter end—whenever that might be. We realize in the middle of the venture that we have not planned as well as we could have. We needed more staff and volunteers. We needed more complex software to manage our data. We didn’t budget enough money to cover the kinds of communication we now need. We are regularly at odds with those who accompany us, our committees and other leadership. Results aren’t coming in the way we had imagined. Given this all-too-common of an experience, what might we do to get ready for a major fund raising campaign that would avoid some of these mid-campaign blues?

Jerry Panas,¹ a consummate professional in the field of fund raising, acknowledges that not every campaign is well-planned and successfully managed. In the past 10 years JPL&P has served over 13,000 client-institutions. Most of those campaigns were “block-busters,” he notes proudly. But he humbly adds, “Let’s face it: a small percentage of our programs were...well..., they were bad. That’s the truth of it. In the course of these years, we have learned a lot about managing a successful campaign. There are no guaranteed. That’s unfortunately true. But there are some verities which provide inviolate benchmarks to winning.”

When someone with this level of professionalism—and honesty—speaks, I’m ready to listen. Some of what Panas shares is not particularly new, but taken as a well-conceived, thorough package, his “verities” are important to learn and apply to any major fund raising campaign that stands before you. Here are Panas’ “Guidelines to Winning:”

- 1. Not every fundraising firm, no matter how good, is right for every institution or every project.** He suggests that organizations interview a number of firms and determine how their strengths will match the needs of the campaign. For our purposes in campus ministry, firms that have a good track record of raising money in congregations may not have the adaptability to transfer those skills to our campus ministry constituency. We may need a firm that functions better in the not-for-profit sector. Prior to the interview we need to develop a list of expectations or criteria for services. We need to check each firm’s record. Ask to see results of their prior work, including a feasibility study they have conducted. The size of the firm is not a determinate, but enthusiasm and a positive spirit are requisite values. Do they share the vision

¹ Jerold Panas. Linzy & Partners, Consultants in Philanthropy, Chicago, IL. Website: www.panaslinzy.com

held by you and your board? Can they provide you with periodic updates? Are they a full-service firm, or will you have to go elsewhere for communications expertise, for example? At base, can they get on board with campus ministry quickly and adequately, or are they slow learners who may never understand our mission?

2. **Insist on a feasibility study.** A feasibility study provides you with accurate and timely feedback about the mission of your organization and the worth of what you propose to do as a result of the campaign. It will point out problem areas, such as inadequate leadership or implications of a struggling economy. One campus ministry I know of proposed a campaign of over \$1.5 million, but when the feasibility study was completed it was obvious that they could hope to raise less than half of that amount. They scrapped the campaign and started over in their visioning process. Feasibility studies need to be done professionally, not by a committee of the board or a friend of the ministry who has a little experience with one in the past. A free study is worth what you pay for it.
3. **Beware of a study report which reads more like a sales document than a careful analysis of your market position.** You are looking for this study to provide you with sharp information and critical documentation. If words like “probably” and “seems like” pepper the presentation, ask for reasons why the objectives listed are achievable. Can the expected outcomes be realized?
4. **Evaluate your board with excruciating candor. The buck starts here!** Not all boards are up to the task of managing a major fund raising campaign. They may not have signed on for such responsibilities, or if they did, they may discover soon that they do not have the commitment or the ability to lead the campaign. Panas has written elsewhere that boards need wisdom, work, wealth, and wallop. If your board is seriously lacking in these attributes, you may need to organize a separate Development Committee or Campaign Committee equal to the task.²
5. **Top Leadership is crucial.** The chair of the campaign committee is the most important person to recruit and should be done first. This new chair, who embodies experience and prominence in the community, needs to be able to participate in the selection of the rest of the committee. Because of who they are, they will be able to make contacts and leverage commitments better than other leaders. Also, campaign leadership need to be involved in the beginning with setting the vision and planning the steps of the campaign. If you can't recruit quality leadership you should postpone your efforts until you can do so.
6. **A campaign is won with large gifts.** This is often where enthusiastic boards go wrong. They look at a successful annual campaign and note the number of \$25 to \$100 gifts, thinking that all they have to do is turn up the volume and larger gifts will flow in. Certainly the truth is that large gifts come from those who have consistently given smaller gifts. However, a large campaign needs many large gifts to succeed. Typically the top third of your total must come from a dozen or so donors. The middle third will come from another 100 or so gifts. And the last third from all others, representing smaller contributions. If you are not able to identify those essential major donors, the odds are against success.
7. **Dare to ask.** This is a whole subject in itself—planning the request, making the visit, following through. Inexperienced campaign leadership often gets cold feet when it comes to asking. They shrink from asking prominent persons or they ask for too little. They may suffer from institutional inferiority. Visitors need to be carefully selected for their energy and their support of the mission. Shy, yet committed, persons can be paired with others who are more

² A job description for a Development Committee is available from Campus Ministry Advancement.

outgoing. Everyone should be trained in good listening skills and provided with good information. Then they must have the courage to ask.

8. **Your project must have sizzle.** The Indiana School of Philanthropy notes that to be successful a campaign must be relevant, important, and urgent. Certainly this is true. It is hard to make a case for replacing bathroom fixtures, boilers, or even a sagging roof. While these items may be urgent, we might strain to interpret them as relevant to the mission. Your campaign has to light the fires of imagination in others. It has to communicate a vision that is compelling. It must talk about changed hearts and saved lives. It has to lift up core values and bring them alive. At the center it must be about the Gospel. All this—with positive pizzazz.
9. **Those who know you best of all, love you most of all.** Panas quips, “You don’t make a pickle by sprinkling a little vinegar over a cucumber. You have to immerse it.” Those individuals who are most involved in your campus ministry and have been kept informed over the years will be your best supporters. Those who have consistently given to your annual fund will be the best prospects for making a larger gift to your new campaign. They don’t have to be convinced of your mission. They know it and will want to support it however they are able. It’s the difference between asking a favorite aunt or a distant relative for a gift. Those who know your ministry most intimately will likely be your most ardent supporters.
10. **The cheapest is not necessarily the least expensive.** The emphasis in a fund raising campaign is focused on the bottom line, the net income. It is not about how much you spend, but on how much you raise. It’s the difference between the two that really counts. The temptation with a campaign running on a shoestring is to economize on things like publicity, mailings, staff, and data management. The old truism is that “you have to spend money to make money.” Along with careful planning and nurtured relationships, adequate resources are a primary consideration.
11. **Pin down time commitments.** This is important when working with everyone, from volunteers and board up to the consulting firm itself. Let everyone know what to expect in terms of the time to complete a successful campaign, then hold them to it. Be sure that the firm you hire is able to do what it says it will do. Be sure you have a written contract where the commitment is specifically spelled out. Be sure your other leadership is on board too. You don’t want to find out in the middle of the campaign that people are exhausted and ready to quit. Nail down these commitments at the beginning or you will never see the end.
12. **Insist on detailed progress reports on a regular basis.** It will be a good idea for key leadership to have strategy meetings at least twice a month to monitor progress and address any complications that arise. Heed early warning signals. Address problems head on. Don’t shrink from making difficult decisions now that will affect the outcome of the campaign later. While a “kick off” may signal the beginning of a campaign, it’s the yardage gained on the ground after the ball is being returned that counts. The analysis of every play is important. There are no “hail Marys” in fund raising.
13. **Be bold. Resist the usual, conventional, and commonplace.** While careful, strategic planning is of ultimate importance, knowing how to lead a campaign with creativity, flexibility, and courage are equally important. It’s this attitude that must accompany the sense of sizzle mentioned earlier. Are there ways to accomplish the goal that hasn’t been tried before? People are tired of run-of-the-mill solicitation letters and boring newsletters. With some reluctance they entertain visitors with a placid pitch. Open their hearts and their minds. Invite them into a vision so compelling that they will thank you for the opportunity to become involved.

Finally, as you begin to plan for your new capital campaign, give some thought to the concept of “ready, fire, aim.” I heard a veteran fund raising say year ago that this is the most common mega-error made in strategic planning. The campaign is launched before adequate planning and visioning have taken place. The infrastructure is not in place or is too fragile. Typically, the major gifts have not been secured before the campaign goes public. What you “aim” to do as a result of a successful fund drive has not been determined in a way that is urgent, relevant, and significant. Once the campaign starting gun has been fired, it is incredibly difficult to step back and attend to some of the prior necessities. Rank each of the thirteen points above according to: definitely, probably, or not at all. Look at the bottom line. Are you ready for a capital campaign?

LAYING OUT A TIMELINE FOR A CAMPAIGN

There is a lot of work that goes into the preparation and planning of a fund raising campaign, even those that have a limited goal and a relatively brief timetable. You and the board have to come up with an idea of where you're going as an organization, how you're going to get there, what you will need on the journey, and what it's going to cost for the trip. Those are some of the essential elements of creating a timeline for fundraising. You have to have a vision, a strategic plan, infrastructure, and expense projections. A timeline is a major tool of the campaign that keeps everyone moving in the same direction at the same pace with, hopefully, the same enthusiasm.

For simplicity's sake, you can think of a timeline with four essential phases:

1. The Readiness Stage (0 to 6 months)

During this stage, which probably begins a full two years prior to the launching of the campaign, all of the tasks related to assessment of the campaign are dealt with. The campus ministry will determine the actual needs and create the vision. Research must be done relative to competing campaigns and other environmental factors, such as economic swings and political movements. Careful analysis of the ministry's current and past giving needs to be done, along with a determination of whether the data base is large enough and supportive enough to carry your campaign. Your mission statement will need to be sharpened. A case statement must be written, so that everyone knows exactly why you need extra funding at this time. A preliminary budget will need to be developed and projected requirements for record keeping, staffing and interpretation materials will need to be included.

2. The Planning Stage (6 to 12 months)

The feasibility study will anchor the beginning of this stage. Once you have made the case to your ministry internally, you must now find out what others think of your campaign. Responses from the feasibility study will give you a reality test of your campaign goals, your proposed strategy and a perception of your ministry from the vantage point of "outsiders." You will now need to return to some of your original planning and make necessary changes in your budget, strategy and campaign goals. Perhaps your case statement will need to be rewritten. A gift pyramid or chart of gifts will need to be built so that you can determine how many gifts will be required at what levels. Major work will need to be done on researching the giving capabilities and interests of your major prospects. Interpretive materials will need to be designed and printed.

3. The Campaign Stage (12 to 24 months)

As the campaign begins, after this essential first year of planning, trained board members and volunteers will begin to invite major gifts to the campaign. Four phases of major gift solicitation are as follows:

A. Leadership Gifts

These are the largest gifts from the very best prospective donors. These are gifts from the top of the pyramid, the 10% who will make up 90% of your campaign. During this "quiet phase" of the campaign many contacts may need to be made with these donors, particularly if they are not familiar with your ministry. A truism is that "strangers don't give," so you may need to build into your timeline a significant block of time to do your best relational work with your primary donors.

Board members will also make their gifts or pledges during this time. Usually large donors will ask, "Have the board members made their pledges already?" You will need to respond by saying, "Yes. I am happy to say that 100% of the board has already pledged,"

At the conclusion of this phase the campaign goal is evaluated once again based on the leadership gifts. That amount may be adjusted up or down. Once the board has determined the "final" goal, the campaign is ready to go public.

B. Major Gifts

These gifts represent the middle layer of the pyramid. Each one is important, but not critical to the campaign. Most of these gifts will come from persons familiar with your ministry, those who have been regular contributors over the years. Relationships may need to be strengthened through personal visits, phone calls or special mailings. At the end of this phase you should have between 75% and 85% of your goal in hand.

C. Events

Special events may be helpful to your campaign, but they are not primarily fund raisers. Indeed, they may cost more than they return. They should be seen primarily as opportunities for publicity, for meeting new friends and for celebrating progress already made. If you are holding a banquet, be sure that attendees make a contribution over and above the cost of the meal (for IRS purposes it is the only portion deductible).

D. Public Campaign

After all of the leadership and major gifts are received or pledged, every other friend and supporter of the ministry needs to be given the opportunity to contribute—even if you have already exceeded your goal. Larger donors look for the support of smaller donors. A successful campaign has a good mixture of donors at all levels. Donors at a lower level will be the future supporters of your ministry. Reach out to every possible contributor.

4. The Wrap-up Stage

Once the cheering and celebrating has subsided, there will be a number of important wrap-up items. Accurate records must be finalized. Publicity and news releases must be prepared. Volunteers should be appreciated and rewarded. A follow up process for tracking pledges should be in place. Thank you letters should have been sent promptly throughout the campaign, although there maybe special letters of thank you to send now.

The board will take some time at the end to analyze several things:

- the number of new donors
- the actual gift pyramid
- the actual cost of the campaign in dollars and staff time
- the number of persons needed to produce each gift
- the percentage of donors who gave at or above expected levels
- opportunities for planned gifts and bequests.

In one sense, a campaign never ends. The annual or sustaining fund continues its cycle. Planned gifts are always held up as options for donors at any time. Further, it is assumed that all of the needs of the ministry have not been met through this one major campaign. So the board will need to begin again

with the process of examining needs, creating a vision and a case for support and building ongoing relationships with future donors.

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DOING A FEASIBILITY STUDY

"Don't attempt a first-time annual drive or any capital campaign -without first seeing if you have the major gift support and available campaigners to make it successful."

L. Peter Edles, FUNDRAISING, McGraw-Hill, 1993

I would like to think with you about the purpose of a timely, well-conducted feasibility study. We know that a feasibility study is an important step in the larger process and that it appropriately belongs well toward the front end of any significant campaign. We also know that in the midst of our enthusiasm to push ahead with our campaign, we have to pause for that one thing that will keep us focused and realistic—the feasibility study. Like all of the automobile manufacturers who roll out concept cars this time of year, we need to roll out the case for our campaign to see what others think of it. That's what a feasibility study does—it tells us whether or not our great vision and our carefully conceived campaign actually are feasible. How do you know when you are ready to lift a major fund raising campaign off the ground? After all of the ideas are in and after the best of them have been coalesced into an overall vision, how do you know you can actually raise the essential dollars you have identified? There are some steps to the process. Let's review them.

First, spend some quality time on the visioning process. What is good about the ministry that currently exists? What needs improving, expanding, creating? How can you talk about this in terms that are "urgent, relevant and important"? How does this vision meet critical human need?

Second, you and your board will have to do an accurate "needs assessment." Determine what you will need to make the vision happen. Be specific. Put dollar amounts on each part of your vision. You will want to set a campaign goal that is accurate—not too little or too much. Then, when you wrap up this segment of work, figure out a way to talk about "inviting people to support your vision" rather than "begging them to meet your needs."

Third, look around you at any contextual factors that could influence your campaign. Are there other major campaigns in your community, in local congregations? How are they going? What are the financial and political climates like? How do people see the university you serve? How do they see your ministry?

Fourth, write a case statement for your ministry. This is a crucial step that may have to be revised several times. Basically it answers the questions: who, what, when, where, how and how much? By reading your case statement, someone who is uninformed should be better informed, even enthusiastic, about your ministry and its vision.

Fifth, conduct a feasibility study. This measures the "external readiness" and helps you to respond to the values and interests of your potential donors. Among other things the feasibility study tests:

- ✓ the way people know and value your ministry
- ✓ the level of confidence people have in your organization
- ✓ the concerns or questions people have about your work
- ✓ the viability of the design of your campaign
- ✓ the likelihood that your constituency will financially support it
- ✓ the size of potential gifts from key prospects
- ✓ any recommendations to improve the campaign.

Usually a feasibility study is conducted by a professional fund raising organization. This will assure both accuracy and objectivity. Although you will need to budget some dollars for the study, it will prove valuable as you move ahead in your process.

In a typical feasibility study a consultant interviews individuals who represent:

- the community in general
- church representatives
- key volunteers
- long-time friends of the ministry
- board members
- established high-level donors
- more modest donors who have higher capacity
- powerful people
- other influential, in-the-know leaders.

At the end of the feasibility study the consultant should be able to provide you with adequate feedback to that you can

1. change any problems or supply missing information
2. adjust your campaign goal up or down
3. resolve any internal roadblocks, such as leadership or volunteers
4. increase the commitment or key leadership
5. Be Realistic!

The feasibility study presents you with a go/no go decision, or will describe those key elements of the campaign that must be made if you are to be successful. Be ready for some surprises. At worst you may have to fix some things before moving ahead. At best you have been given the green light and people are cheering from the sidelines and waiting to be involved. All of the preparation time may now seem to be worth it. You have a clear, compelling vision, you have made your case, and you have tested the interest of your constituency. You have the green light. The next stage, the actual campaign, will be exciting. Enjoy!

TRACKING YOUR DONORS

It's time-consuming. It's frustrating. It's never-ending. But it's one of the most important day-to-day tasks in the fundraising business: keeping track of your donors.

In campus ministry the process often goes like this. Students actively involved in your ministry approach graduation. During the last few weeks you see them less frequently because they are tied up with graduation plans, end of the year papers and exams, plans for jobs, and/or graduate school. Before you know it, they have walked in the square hat parade and slipped through your fingers. Now it may take you a lot of time and effort to find out where they have relocated, if you find them at all. Even university alumni centers struggle with tracking graduates. So here are some thoughts about how to keep in touch with your graduates, whom you hope will find well-paying jobs and become your best donors in the years to come.

First, talk about Christian stewardship when they are still students. Help them understand the relationship between the blessings in their lives and the gospel challenge of sacrificial giving. Do you receive an offering at worship regularly? Do you have service projects that help to focus their giving beyond the immediate needs of the community of faith? Does your worshipping community contribute to denominational benevolence, if even a small amount? Do you help students understand the connectedness between congregational stewardship and the larger work of the church? Have you helped them experience the joy of giving both regularly and sacrificially? If we are serious about training leaders for the church, we will need to spend some effort helping students learn stewardship while they are on campus, so that they can become committed contributors to congregations in the future and to our ministries on a continuing basis.

Second, connect students with the giving plan for your campus ministry early on. When you roll out your invitations to contribute to your annual fund, don't bypass students. Even if they can only give \$5.00 now, it establishes the connection of giving to your ministry on a regular basis. Later, when they are bringing in those first paychecks, they will continue to see campus ministry as one of those causes that deserves their ongoing support.

Here's a model you might like to consider. A campus ministry held a grand banquet for graduates at the end of the academic year. At the banquet they celebrated the ministry and all that these students had contributed to it over the years. Then these students were asked to help continue this ministry by making a three-year pledge of support. It was understood that the first year contribution might be small, perhaps only \$25 on a \$500 total pledge. The second year the contribution might increase to \$100, while the third year would be larger and complete the remainder of the pledge. Then, in good fund raising style, these good donors were asked to renew their pledge, this time at an increased amount. What I like about this model is that it takes student stewardship seriously and their ability to contribute even now from a limited income, with the expectation that with future employment might come larger contributions. How could you adapt this model in your campus ministry?

Third, we need to think of parents as both current and future contributors. Many of us have been successful in asking parents to give to programs or mission trips, fully expecting them to support things in which their daughters and sons participate while on campus. We need to consider, however, how we might keep those parents as continuing donors after their children graduate. We should expect that if they once saw the value of what we do, they will continue to see its value and support our mission if we keep them in touch and ask for their help. For every active student who graduates, there should be two new addresses in your database—their own and that of their parents.

Fourth, we are missing a major piece of what alums can contribute if we think only of dollars. We need to be inviting students as they graduate (and all others on our donor list) to contribute their positive perceptions, creative concerns, and amazing ideas. We want to keep the total person engaged in our ministries, not just their bank accounts.

In the June 2002 issue of *Harvard Business Review*, corporate executives Cem Sertoglu and Anne Berkowitch suggest that company alums (former employees) have much to offer in the way of intelligence, new business and superior recruiting. They write, "A good alumni relations program for companies begin with: an enlightened exit process, encouraging alumni to stay in touch and capturing valuable knowledge as an employee departs; a two-way value proposition, promising some sort of reciprocity for ex-employees that stay in touch, like special programs, incentives for ideas and so forth; and personalized communications, keeping in touch with substantive updates on company plans and needs."¹

If we were to consider the "value" of each person on our donor base in terms of their insights and ideas, along with their wealth, we would be more effective in nurturing relationships that take a deeper sense of stewardship into account. In fact, donor stewardship gets turned around when we begin to think of OUR responsibility for supporting and nurturing the lives of those who have sprung from and continue to live from our ministries on campus. When students graduate, perhaps we should be doing "exit interviews," asking them for their thoughts and telling them that we will continue to value their ideas.

The key phrase in philanthropy these days is "relationship fundraising," a phrase coined by Ken Burnett in 1992, but something we have known in church circles all along. In his new book by that title,² Burnet says, "Our business is donor development, and that is only possible through the formation of a tangible relationship. As donors, by and large, are honest and intelligent people, it is a process that can only be done with honesty and intelligence." We need to move from a transaction orientation to a relationship orientation he urges. As students leave, we want them to know that we value their ongoing relationship with the ministry.

To keep track of students as they leave our communities, be sure to ask them for a "permanent" address that will serve in the short term as a place to contact them. This may be their parents' address, for example, if the student is traveling abroad or taking on a year of internship somewhere. When you send mail, send something every 3 months or so and mark it "Address Service Requested," That way you will catch address changes before it is too late to forward mail. Also, allow folks to update mailing addresses via a Web site form or e-mail.

If the inevitable has happened, however, and lots of current and former students have slipped away, how can you go about relocating them and inviting them to become involved in your ministry once again?

Telephone directories on the Web provide one means of finding folks. However, there are limitations, because these directories are privately compiled, meaning that the information might be incomplete, inaccurate or out of date. Not all directories give addresses along with phone numbers and not much information is free. Try several directories if the first one fails. One meta-search engine for telephone directories is The Ultimates (<http://theultimates.com>). You enter the names and location just once and Javascript fills in the rest. The directories currently searched are Whitepages.com; Infospace; Yahoo! WhoWhere; Switchboard; and AnyWho. The service for most of these sites is still free, but for an annual fee of \$12 or so you can enjoy faster results and get e-mail support.

¹ Cited by Paul C. Pribbenow in "Trends and Issues," CONTRIBUTIONS, Sept-Oct. 2002, P. 21.

² RELATIONSHIP FUNDRAISING by Ken Burnett is available from The Compleat Professional's Library, P.O. Box 338, Medfield, MA 02052, Cost #34.95, plus \$4.95 shipping. 508-359-0019.

If you want to update large numbers of addresses you might want to use an outside vendor. A service called National Change of Address (NCOA) can be helpful, but its records go back only 48 months. A list of all licensed NCOA vendors can be found at <http://ribbs.usps.gov/files/vendors/ncoavend.txt>. Other vendors that prospect researchers find useful are: AutoTrackXP (<http://www.dbt.com/default.asp>); Alumni Data Services (<http://www.1stdirect.com/alumnidataservices.html>), and EMS (<http://allantgroup.com/products.html>).

Finally, you might just get lucky by trying a general search engine, such as Google. Since federal political contributions require an address, you might find your lost alum if they contributed \$200 or more by going to <http://www.tray.com>. Real estate transactions might be identifiable if you can narrow down the location. Try Search Systems at <http://www.searchsystems.net>. Death confirmations are available by consulting with the Social Security Death Index (SSDI). You can reach them at RootsWeb: <http://ssdi.genealogy.rootsweb.com/>.³

If all else fails, you might try to contact the university alumni office, the person's last-known place of employment, their family and friends, or their home congregation.

All of the above tasks are a great use of volunteer time—something they can even do from their own homes on their own schedule.

At long last, when you have located all of your lost souls and supporters, you will want to keep serious records in a good data system that records at least all of the following:

- Name and address
- Year of graduation
- Other schools attended (e.g. seminary)
- Occupation
- Marital status and children
- Permanent address if needed
- Dates and amounts of all gifts
- Notes about interests and concerns
- Areas of ministry in which they were involved
- Other charitable contributions
- Real estate transactions
- Significant promotions or events in their lives

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³ Internet information provided by Susan Rudennan in "Panning for Gold." *CONTRIBUTIONS*, Sept-Oct, 2002, pp. 20-22,32.

VISITING YOUR DONORS

After all of the planning and strategizing, after all of the prospecting and database dabbling, after all of the case statement writing and the feasibility studying, it's finally time for the most important piece of fund raising—actually meeting with potential donors and inviting a gift for your ministry. For some of us this is the exciting stage, while for others it's like being a mouse at a convention of cats. While you may think you're foolish for setting up the visit in the first place, and you fear that you will never come out alive—let alone alive with an affirming gift for your ministry—let me assure you that virtually every visit you make will be encouraging, regardless of the size of the gift.

Many have been there before you, and many are there now while you're sitting around procrastinating and worrying about just how to make this visit. When you unwrap the negative feelings you may have about this experience, however, it may often mean that we are carrying old baggage about fund raising that expects manipulation and the hard knuckle "ask" to carry the day. First Monday readers know better.

Visiting with your supporters about a gift for your campus ministry is a wonderful opportunity for both you and the donor. It is a chance to talk enthusiastically about your ministry. More important, it is a time to listen carefully to the motivations and interests of the donor's heart. You are a bringer of good news, come to share with another person who cares about the joys and challenges of the ministry you both hold dear. You are a matchmaker, whose task at this visit is to make a match between the interests of the donor and the opportunities provided through your ministry. What could be more exciting and rewarding?

Jerry Panas, who I quote frequently, urges, "Your job is to involve people in programs of towering proportions . . . to make true believers from those who do not know the full story of your work . . . to make joyful investors out of those who in the past may have only been contributors."¹ Obviously this means listening a whole lot more than talking, and explaining rather than selling. Later on Panas writes, "The fundraiser's job is to create a clear understanding of the institution's distinct mission . . . and then help the donor feel a high level of urgency about providing the necessary funds to meet that mission."²

During this centennial year for campus ministry, personal contact with our supporters and donors is highly important. We have a ready-made opportunity to lean on the strength of the past, while we lift up the vision we hold for a new century. If ever there was a time to enlist "joyful investors," the centennial year is it!

To help you plan for making these important visits, here are some practical pointers about visiting prospective donors that I have gleaned from a variety of sources and workshops.

- If you don't know the prospective donor well, ask a mutual acquaintance (such as a pastor, faculty member, or church member) make the appointment for you. You might also have this person write a letter of introduction for you or say that you will call soon. Then you follow up with the contact.

¹ Jerry Panas, *Finders Keepers*, (Bonus Books: Chicago, IL, 1999) p. 16

² Panas, p. 19

- If you know that the person has supported the ministry in the past, the call will be easier. You might say, “You have been very generous in your support of campus ministry in the past. Members of the board and I would like to meet with you to share some information about a significant new venture.” (then be sure it’s significant)
- If the person says that they are not interested in making a gift at this time, respond by saying, “We’re more interested in telling you about our vision than we are in a gift right now. We would value your feedback on what we are proposing to accomplish.”
- Meet in a neutral location if possible. It puts everyone on even ground. Inviting yourself to the donor’s home may seem invasive, even though they might offer. Suggest a restaurant or coffee shop, or better yet the campus ministry center if they haven’t been there for some time. Ask them about their favorite place for lunch—and YOU pick up the tab. Be as accommodating to their schedule and needs as possible.
- If you are uncomfortable meeting alone with a new contact, ask in advance if you might bring someone else with you, such as a board member or a knowledgeable student. But don’t let it seem like you are ganging up on them.
- Take some pertinent information with you. Your case statement would be important to share, along with any vision documents and budget projections. Photos add variety to printed text. Don’t overwhelm them; take only enough material to use during the meeting or leave behind for future reference.
- Prior to the visit, anticipate the questions or concerns that may be voiced. Prepare responses appropriately, but avoid wooden answers. You will want to be as conversational as possible.
- Once the meeting has begun, listen 80% and talk only 20%. Never argue; you’re there to share information. If the donor asks a lot of probing questions they are not fighting you. They are trying to convince themselves that your vision is worthwhile. Restate any objections as a question. Ask them to say more about their concerns. See if there can be connecting points of agreement. In the business of listening, everything is important—words, body language and gesture, tone, stories. Listen with your eyes as well as with your ears.
- If you are tempted to counter the person’s story with one of your own—stop! Don’t say, “I know exactly what you mean.” Ask them to tell you more. The purpose if the meeting is to find out what the person’s own needs and interests are. Don’t superimpose yours on the conversation.
- Although you both know that the purpose of the visit is to discuss a gift for the ministry, remember that the visit has not been a failure if you come away without a definite gift. See if you can set a date to meet again. Offer to provide more information if necessary. When donors make a larger gift, they have to “stop and think” about how they are going to make their commitment, where the funds will come from, consult their financial advisor, etc. If

you can leave the meeting with an agreement to talk more at a specific date not too far in the future, the visit accomplished quite a lot.³

- The timing of the meeting is important. If you agreed to one hour, be sure that you're putting you coat on at minute fifty-nine. While listening is important, you will finally need some time to negotiate the gift you're seeking. Plan in your own mind the amount of time you will spend on small talk, how much time you will listen and respond, and how much time you will need to close. If things seem rushed, ask if you might extend the time or make another appointment. You want to be sure that the donor fully perceives the benefits of making a gift to the ministry you represent at this particular time.
- Be specific about the amount of the gift you are seeking. Before the appointment you and your development committee should have prepared a "chart of gifts." You should have some idea of where this particular donor fits into the chart. Knowing that, you might say, "To achieve our goal we need 10 leadership gifts of \$25,000. Can we count on you being among the ten?"
- Don't be afraid to ask high. If this is a major gift request, beyond the annual fund contribution, you can consider something between 10-20 times higher the annual amount if gifts have been consistent. This assumes that you have done your research and know something about the donor's capabilities and interests. People are usually flattered to be asked to give more than they think they can. When in doubt it's fine to say, "What are you able to consider?" Or even better, "What would bring you the most joy?"
- Relax. Be patient. Allow brief times of silence. Don't drive the conversation like Tim Russert on *Meet the Press*. Let the person finish their thought before responding.
- Once the gift has been identified, say "thank you" and leave. Be sure to send a note of appreciation within the next three days. If you have promised to send more information or a pledge card, be sure to do so promptly.

As you move more deeply into your campaign and building relationships with potential donors, you will likely identify many individuals who you would like to visit. Enlist your board members and/or trained volunteers to help you with these important contacts. Invite your special donors ever more deeply into your vision for years ahead—and they will want to be assured that there are years ahead. Find a way to convince them that their gifts will be put to good purpose to keep your ministry strong and expand it in important ways. Share your vision and ask them to join you. Everyone will benefit from this focused visitation.

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³ A prospective donor I worked with several years ago always talked over gift possibilities with his extended family at Thanksgiving time when they gathered each year in Naples, Florida. To press for a more immediate response would have offended the donor and probably would have lost the gift.

EXAMINE YOUR MONEY CULTURE

Recently I attended a gathering of campus ministry staff and board members. We began our conversation by sharing memories of money, beginning with our earliest experiences and leading up to how those experiences form our “culture” of money today. One person said that she grew up with a sense that money was magic. All you had to do is ask for it, and it appeared. Another person said that his family never had enough, so he learned to save, even hoard, what he had. Someone else learned about fairness when it came to giving and receiving money; everyone should be treated equally regardless of age or place in the family. Still another person shared an experience where money was used as power and the withholding of it was a punishment. We have each become enveloped in a “money culture” through past experiences, hard-learned lessons, or admonitions from parents and other mentors.

Those who grew up during the Depression learned to “save for a rainy day,” and find it difficult to spend money on things that are not absolutely necessary. They protect their assets. They share, but only after careful scrutiny of the need. They will join together with others to accomplish a larger task that they cannot change by themselves. Thus, we saw in the Depression generation very strong support of larger philanthropic ventures, such as the United Way and, within the church, a unified budget. “Save it now, we might need it later,” became their mantra when it came to money. Those of us who grew up on households influenced by that culture learned to do without or with less, and to creatively address financial need, by doing such things as making our own clothing or renovating a building with volunteer labor. Some see this kind of careful frugality and community spirit recycling in the current Habitat for Humanity movement, for example.

Those who are identified as “Baby Boomers” enter a money culture that focused on a “do it now” sense of entrepreneurship. The War was over and there were goods to consume, suburbs to build, and great things to accomplish. “Buy it now and pay for it later,” was the call. Credit cards appeared in every purse. Immediate gratification was the accepted style of consumerism. Money was readily available, at least by credit. Money became more powerful, as capitalism stretched its lengthy arms to embrace a burgeoning middle class. Those who grew up in Boomer households learned how to spend, but not necessarily how to save. They might defer maintenance on buildings and spend income on other items, like entertainment or automobiles. Tomorrow is uncertain; enjoy today.

The money culture of the current generation of young adults is in some ways affected by both previous generations. They know that money is often hard to come by, and they know some of the pitfalls of overextended credit by watching their parents struggle with debt. They know, also, that they may be the first generation not to be better off than their parent’s generation. They will probably have less, but they don’t have any lessons in how to live with less. If they have a mantra, it’s likely to be, “spend it when you have it, and when it’s gone, oh well.” They don’t expect to save for a rainy day, for that day may never come. Even more so than their elders, they are less likely to give to larger solutions to public needs. They would rather travel to the Gulf Coast to work on a cleanup project than write a check to a relief agency. They want their contributions of energy and money to be used in an immediate, identifiable context. They want to see results and participate in shaping those results as well.

These brief examples of how a money culture develops might be useful in understanding your own personal sense of money, its power and purpose. The Ministry of Money, an organization located in Germantown, Pennsylvania, offers a variety of interesting and helpful resources that address this discernment process.¹ Often in a retreat setting, they help participants delve into questions about their personal money messages.

Borrowing that idea, consider spending some time at a meeting of your ministry board, asking members to respond to the following questions:

- What is your earliest memory of money?
- What messages about money did you learn growing up?
- Who controlled money in your family? How was that done?
- How did your family contribute to the needs of others?
- What happened when money was scarce?
- Was there a strong connection between money and your sense of self?
- How did your family prepare for the future?
- How did they deal with financial crises?
- Was money talked about openly or was it a secret not to be discussed?

A second set of questions for a subsequent meeting might be:

- What did you learn about money from your home congregation?
- Was money talked about openly and frequently, or was it only the topic of the annual boring stewardship sermon?
- Were there persons in your congregation who modeled good stewardship?
- Was tithing advocated?
- How did your congregation handle financial crises?
- Did they have an endowment fund or a savings fund for emergencies?
- Who controlled the money?
- How did your congregation contribute to benevolence causes, including synodical and churchwide support?

Perhaps at still another gathering you could ask your leadership to think about the money culture of your campus ministry. It will likely reflect both personal and congregational cultures. Participants may be surprised to find that there is very little agreement about money issues, but that it is not talked about either. Here are some additional questions:

- How is money talked about within campus ministry circles?
- Who develops and monitors the budget?
- How are students encouraged to think about stewardship?
- What will your ministry do when a financial crisis hits?
- Who makes decisions about how money is spent?
- Is there an endowment or savings account?

¹ www.ministryofmoney.org

- What is the perception about benevolence? Is it assumed, scarce, generous, fragile, unpredictable, or out of our control?
- If extra funds are needed, where will they come from?

The task of generating financial resources for campus ministry hinges in a considerable way on the individual and corporate money culture. Board members who are uncomfortable with money issues personally will have trouble asking a donor to make a gift to the ministry. Their own reluctance to discuss money will make it very difficult to have an open discussion with a relative stranger, let alone a personal acquaintance. Talking about money can be a ministry, as Henri Nouwen suggests.² But if a person has other gifts for ministry, and openly talking about money isn't one of them, that needs to be acknowledged up front and the donor call assigned to someone else.³

Board members who are accustomed to living with deferred maintenance or share an “enjoy now, pay later” approach to life will require the balance of other members who are careful financial planners on the board. Financial spontaneity needs to be complemented with fiscal accountability. Creativity needs caution, and vice versa. If “money is magic,” then who does the hard work of executing the annual fund and planning for the future? How far can you take the sense that “God will provide?” If board members put their collective head in the sand and choose not to address serious financial issues, the whole ministry is placed in jeopardy. It may be beneficial to talk about your money culture before emergencies call for it.

Finally, it would be helpful to ask board members to talk about their understanding of church benevolence. Do they think that more will be available if they press the power buttons? Whine for it? Use it deceptively? (Is there a corporate adolescence?) Do they plan to use it wisely? Are those who provide benevolence support seen as generous or stingy? Is gratitude expressed in return?

Give some serious thought and conversation to the money culture that surrounds you. It will give you and your board some vital information about how to approach the ministry of money.

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² Henri J.M Nouwen, *The Spirituality of Fund-Raising*, (Henri Nouwen Society: Richmond Hill, Ontario, 2004).

³ “The reason for the taboo is that money has something to do with that intimate place in our heart where we need security, and we do not want to reveal our need to give away our security to someone who, maybe only accidentally, might betray us.” p. 14